

Issues & Observations

Taking the Balcony View

Sam Manoogian

Once had the opportunity to observe senior executives from a Fortune 500 communications company go through an outdoor simulation run by Executive Expeditions, an organizational consulting firm based in Roswell, Georgia. The simulation was highly realistic and involved a plane crash, multiple accident victims, encoded messages that needed to be deciphered, and a potential terrorist threat that endangered the local water supply. The scenario was played out over hundreds of acres of parkland in Stone Mountain, Georgia, and involved a number of vehicles and boats and an array of props and equipment.

The classroom setup prior to the simulation revolved around a metaphor found in Ronald A. Heifetz and Marty Linsky's book *Leadership on the Line: Staying Alive Through the Dangers of Leading* (Harvard Business School Press, 2002). In a chapter titled "Get on the Balcony," the authors write that the ability to step back, see all the action, and take an objective view of events, rather than a subjective, emotional, tunnel-vision perspective, is essential to effective action and may be the most important skill of all for leaders. Heifetz and Linsky use the metaphor of a large floor full of dancers observed by a few people from a balcony. "The only way you can gain a clearer view of reality and some per-

spective on the bigger picture is by distancing yourself from the fray," they write. "To see yourself from the outside as merely one among the many dancers, you have to watch the system and the patterns, looking at yourself as part of the overall pattern. You must set aside your special knowledge of your intentions and inner feelings, and notice that part of yourself that others would see if they were looking down from the balcony."

During the simulation, however, the participants were asked by the trainers and facilitators what they thought was going on from the balcony perspective, and from their answers it was clear that few of them had spent much time observing from that vantage point, even though they had been encouraged and prodded to do so.

Why was that? The reason is that the typical executive's overwhelming predisposition is toward action and immediacy rather than inaction and reflection. A typical response during the debriefing sessions after the simulation went something like this: "I felt comfortable and useful when I was doing something, especially something I knew how to do. Whether I was tying knots for a rescue rope or trying to break a hidden code or driving the boat around the lake looking for clues, I felt like I was making a contribution. I felt better doing those things than I did when I was standing around doing nothing." It was clear that staying active and busy was easy, comfortable, and familiar for the executives, whereas being quiet and reflecting on the bigger picture were unfamiliar and uncomfortable, and provoked anxiety.

Most executives like being where the action is, and that's where they tend to stay.

When asked whether they had an organizing framework through which to understand or relate the various events that were unfolding, most of the teams participating in the simulation conceded they did not. This should come as no surprise, given the executives' reluctance to either individually or collectively step back and go over the information they knew with the intent of understanding, directing, or strategizing about the process. What's wrong with that? Nothing—in the short run. But after several days of the simulation, as the deadline approached and Atlanta's water supply was at risk, certain critical decisions had to be made. Was it more important to find the radio transmitter or to break the code? Were the injured people sources of valuable information or merely innocent victims? It became increasingly important to have a working framework through which to understand the events, as well as some alternatives, depending on what the new information revealed. Without an adequate or at least working assumption about the bigger picture, individual actions lacked focus and direction. The significance of new information was unclear and thus was often dismissed as irrelevant. The view from the balcony of the teams' efforts was one of chaos more than of choreography.

MAKING SPACE

The first essential ingredient of taking a balcony perspective is time.

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You have to make space in your workday to live and breathe the rarified air of the balcony. Most leaders need to schedule the time to do this. Unless you are a most unusual executive, it is too easy for other matters—some important and some not—to encroach on this time. Why? Because for most executives, viewing events from the balcony is the hardest work they do. They are not sure how to do it, it often doesn't look or feel productive to them, and they don't feel competent at or confident about it. Unfortunately, the latter perception is often accurate, but leaders *can* get better at taking the balcony perspective.

The cardinal rule of behavior change is to start from where you are. In the beginning, an ambitious but realistic time objective for most executives to spend on balcony work is between a half hour and an hour and a half per week. The time goal that is set should be related to how much the executive's job requires or depends on balcony-view skills and to the executive's ultimate goal for doing more balcony work. In addition, an early task will be figuring out what balcony work looks like for the executive.

Balcony work is a curious blend of the cognitive and the creative. It is best done when the individual is rested and at peak mental functioning. Therefore, if you are not a morning person, morning is obviously a poor choice of time. Quiet helps, so most people eliminate or at least minimize the distractions of visitors, phone calls, and e-mails. Shutting your office door—if you have one and it is organizationally acceptable to close it—helps. Even better is to go for a walk or otherwise get a change of scenery. (During some of your balcony work you will engage others, so these rules are not iron-clad.) I find that traveling by air is an oddly disruption-free time. Maybe the thin air at 30,000 feet really does alter one's perspective. Also, business

books and magazines can be useful stimuli for balcony work.

Keep a record of your thoughts, ideas, and questions. Keep a folder of interesting ideas to follow up on, so you will have ready and easy access to them later. After the process of balcony work becomes ingrained, you will be amazed at how many associations you come across in a week—things that might have barely registered in your consciousness before.

Here are some suggestions for questions to consider when doing balcony work:

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"If I try to look six months down the road, what changes do I expect in any areas that might affect my business?"

"What are the best- and worst-case scenarios? Have I planned adequately for both possibilities?"

"What are the bellwether indices for my business or industry?"

"What kinds of changes are occurring in related areas—such as among my suppliers, customers, or distributors—that will eventually affect me?"

TAKING THE STAIRS

Some of your balcony time will be spent making connections with the realities—and the weaknesses—found on the dance floor. Conversely, you will find that it becomes easier when you're on the dance floor to take a "balcony break"—a five- to fifteen-minute mental walk up the stairs to the place where you can ask

yourself: "I wonder what this [the crisis or problem you are dealing with] means from the balcony view of our business?"

Stop and engage a colleague in this exercise. It often helps to interact with others to get alternative views. Seek out people who will push back and actively participate in a lively discussion. Especially seek out those who see the business from a different point of view, both functionally and experientially.

THE NATURALS

Some executives' temperaments and skills make them more suited for and comfortable with balcony work. Their consciousness is constantly bombarded by these kinds of questions and dialogues, whether they are commuting, sitting in staff meetings, watching the news, talking with neighbors, or taking a shower.

They tend to see the big picture and not get absorbed in details, to be intuitive and futuristic rather than concrete and tied to traditions, and to gravitate toward the cutting edge rather than the tried-and-true.

For executives who take to the balcony perspective by nature, the challenge is a bit different. They need to be certain to formalize their balcony work, practice it, record it, and impart it to others. They also need to recognize that although taking the balcony view may be different from what most other people do, it is a valued and valuable activity and may be their unique organizational contribution. It is a rare organization where the senior leadership overemphasizes the balcony point of view. ♪

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